

The Claims:

1. (Previously presented) A system for implementing a recording plan based upon the presence of a client, comprising:

one or more processing units;

a client monitor operable to, when executed by at least one of the one or more processing units, generate a presence message signifying the presence of a client on a network associated with the system, wherein the presence message comprises a presence type and a client identity; and

a plan manager operable to, when executed by at least one of the one or more processing units:

receive the presence message from the client monitor;

retrieve a plan template in response to receiving the presence message, wherein the plan template is retrieved based upon the client identity and the presence type; and

create a recording plan associated with the client based at least in part upon the plan template.

2. (Original) The system of Claim 1, wherein the network comprises at least one of a voice network and a data network, wherein the presence type indicates the presence of the client on at least one of the voice network and the data network.

3. (Original) The system of Claim 1, wherein the plan template comprises a plurality of recording parameters, trigger information, and participant information.

4. (Original) The system of Claim 3, wherein the recording parameters define a number of recordings to be made for a plan period.

5. (Original) The system of Claim 3, wherein the recording parameters further define a recording pattern according to which the recordings are made during the plan period.

6. (Original) The system of Claim 3, wherein the recording parameters further define a type of recordings to be made.

7. (Original) The system of Claim 3, wherein the trigger information comprises a plurality of trigger conditions used to initiate recording of at least one of a voice session and a data session conducted by the client.

8. (Original) The system of Claim 1, wherein the plan manager is further operable to retrieve client information based upon the client identity, in response to receiving the presence message, and to create the recording plan further based upon the client information.

9. (Original) The system of Claim 1, wherein the plan template indicates a plan period and the client information indicates client availability for at least a portion of the plan period.

10. (Original) The system of Claim 9, wherein the plan manager is further operable to assign a priority to the recording plan based at least in part upon the client availability.

11. (Original) The system of Claim 1, wherein the recording plan comprises a plurality of trigger conditions used to initiate recording of at least one of a voice session and a data session conducted by the client.

12. (Original) The system of Claim 11, wherein the trigger conditions are based upon computer telephony interface (CTI) events.

13. (Original) The system of Claim 11, wherein the trigger conditions are based upon keyboard entries at a computer associated with the client.

14. (Original) The system of Claim 11, wherein the trigger conditions are based upon an application launched at a computer associated with the client.

15. (Original) The system of Claim 1, wherein the recording plan comprises recording instructions.

16. (Original) The system of Claim 15, wherein the recording instructions define a number of recordings to be made for a plan period.

17. (Original) The system of Claim 16, wherein the instructions define a recording pattern according to which the recordings are made for the plan period.

18. (Original) The system of Claim 17, wherein the recording pattern comprises at least one of a random pattern, a first available pattern, a manual pattern, and a dispersion pattern.

19. (Original) The system of Claim 1, further comprising a record manager communicatively coupled to the plan manager, wherein the recording plan comprises at least a voice recording plan, and the plan manager is further operable to communicate the voice recording plan to the record manager.

20. (Original) The system of Claim 19, further comprising a trigger manager communicatively coupled to the plan manager, wherein the voice recording plan comprises a plurality of trigger conditions, and the plan manager is further operable to communicate the voice recording plan to the trigger manager.

21. (Original) The system of Claim 20, wherein the trigger manager generates a record command in response to detecting at least one of the trigger conditions, and wherein the record manager records a voice session conducted by the client, in response to the record command.

22. (Original) The system of Claim 19, wherein the record manager records a voice session conducted by the client, according to the voice recording plan.

23. (Original) The system of Claim 22, further comprising a session manager communicatively coupled to the record manager, wherein the record manager communicates a request message to the session manager and records the voice session according to the voice recording plan if it receives an authorization communicated by the session manager.

24. (Original) The system of Claim 1, further comprising a client manager operating on a computer associated with the client, wherein the recording plan comprises at least a data recording plan, and the plan manager is further operable to communicate the data recording plan to the client manager.

25. (Original) The system of Claim 24, wherein the client manager records a data session conducted by the client, in response to detecting at least one trigger condition associated with the data recording plan.

26. (Original) The system of Claim 25, further comprising a session manager communicatively coupled to the client manager, wherein the client manager communicates a request message to the session manager and records the data session according to the data recording plan if it receives an authorization communicated by the session manager.

27. (Original) The system of Claim 1, further comprising:
a record manager communicatively coupled to the plan manager; and
a client manager operating on a computer associated with the client;
wherein the recording plan comprises a data recording plan and a voice recording plan, and the plan manager is further operable to communicate the voice recording plan to the record manager and to communicate the data recording plan to the client manager.

28. (Original) The system of Claim 27, wherein the record manager records a voice session conducted by the client, according to the voice recording plan.

29. (Original) The system of Claim 28, further comprising a session manager communicatively coupled to the record manager, wherein the record manager communicates a request message to the session manager and records the voice session according to the voice recording plan if it receives an authorization communicated by the session manager.

30. (Original) The system of Claim 29, wherein the session manager generates a record command in response to the request message communicated by the record manager, and wherein the client manager records a data session conducted by the client in response to the record command.

31. (Original) The system of Claim 27, wherein the client manager records a data session conducted by the client, in response to detecting at least one trigger condition associated with the data recording plan.

32. (Original) The system of Claim 31, further comprising a session manager, wherein the client manager communicates a request message to the session manager and records the data session according to the data recording plan if it receives an authorization communicated by the session manager.

33. (Original) The system of Claim 32, wherein the session manager generates a record command in response to the request message communicated by the client manager, and wherein the record manager records a voice session conducted by the client in response to the record command.

34. (Original) The system of Claim 1, further comprising a trigger manager, wherein the recording plan comprises a master recording plan, and the plan manager is further operable to communicate the master recording plan to the trigger manager.

35. (Original) The system of Claim 34, wherein the trigger manager generates a record command in response to detecting at least one trigger condition associated with the master recording plan, and further comprising a record manager that records a voice session conducted by a client in response to the record command.

36. (Original) The system of Claim 1, wherein the network comprises a voice network and further comprising a call manager operable to:
determine that the client has logged into the voice network; and
communicate a message to the client monitor identifying the client.

37. (Original) The system of Claim 36, wherein the voice network comprises a computer telephony interface (CTI) server and the call manager determines that the client has logged into the voice network in response to receiving a CTI event message.

38. (Original) The system of Claim 1, wherein the network comprises a data network and further comprising a client manager operating on a computer associated with the client and operable to:
determine that the client has logged into the data network; and
communicate a message to the client monitor identifying the client.

39. (Original) A system for implementing a recording plan based upon the presence of a client, comprising:

a memory operable to store a plurality of plan templates and client information; and
a processor coupled to the memory and operable to:

receive a presence message signifying the presence of a client on a network associated with the system, the presence message comprising a presence type and a client identity;

retrieve a plan template from the memory in response to receiving the presence message, wherein the plan template is retrieved based upon the client identity and the presence type; and

create a recording plan associated with the client based at least in part upon the plan template.

40. (Original) The system of Claim 39, wherein the network comprises at least one of a voice network and a data network, wherein the presence type indicates the presence of the client on at least one of the voice network and the data network.

41. (Original) The system of Claim 39, wherein the plan template comprises a plurality of recording parameters, trigger information, and participant information.

42. (Original) The system of Claim 39, wherein the processor is further operable to retrieve client information based upon the client identity, in response to receiving the presence message, and to create the recording plan further based upon the client information.

43. (Original) The system of Claim 42, wherein the plan template indicates a plan period and the client information indicates client availability for at least a portion of the plan period.

44. (Original) The system of Claim 39, wherein the recording plan comprises a plurality of trigger conditions used to initiate recording of at least one of a voice session and a data session conducted by the client.

45. (Original) The system of Claim 39, wherein the recording plan comprises recording instructions.

46. (Original) The system of Claim 45, wherein the recording instructions define a number of recordings to be made for a plan period.

47. (Original) The system of Claim 46, wherein the recording instructions define a recording pattern according to which the recordings are made for the plan period.

48. (Original) The system of Claim 47, wherein the recording pattern is at least one of a random pattern, a first available pattern, a manual pattern, and a dispersion pattern.

49. (Original) The system of Claim 39, wherein the recording plan comprises a voice recording plan and the processor is operable to record a voice session conducted by the client, according to the voice recording plan.

50. (Original) The system of Claim 39, wherein the recording plan comprises a data recording plan and a computer associated with the client is operable to record a data session conducted by the client, according to the data recording plan.

51. (Original) A method for implementing a recording plan based upon the presence of a client, comprising:

receiving a presence message signifying the presence of a client, the presence message comprising a presence type and a client identity;

retrieving a plan template in response to receiving the presence message, wherein the plan template is retrieved based upon the client identity and the presence type; and

creating a recording plan associated with the client based at least in part upon the plan template.

52. (Original) The method of Claim 51, wherein the presence type indicates the presence of the client on at least one of a voice network and a data network.

53. (Original) The method of Claim 51, wherein the plan template comprises a plurality of recording parameters, trigger information, and participant information.

54. (Original) The method of Claim 51, further comprising retrieving client information based upon the client identity, and wherein the step of creating comprises creating the recording plan further based upon the client information.

55. (Original) The method of Claim 54, wherein the plan template indicates a plan period and the client information indicates client availability for at least a portion of the plan period.

56. (Original) The method of Claim 51, wherein the recording plan comprises a plurality of trigger conditions used to initiate recording of at least one of a voice session and a data session conducted by the client.

57. (Original) The method of Claim 51, wherein the recording plan comprises recording instructions.

58. (Original) The method of Claim 57, wherein the recording instructions define a number of recordings to be made for a plan period.

59. (Original) The method of Claim 58, wherein the recording instructions define a recording pattern according to which the recordings are made for the plan period.

60. (Original) The method of Claim 59, wherein the recording pattern is at least one of a random pattern, a first available pattern, a manual pattern, and a dispersion pattern.

61. (Original) The method of Claim 51, wherein the recording plan comprises a voice recording plan and further comprising recording a voice session conducted by the client, according to the voice recording plan.

62. (Original) The method of Claim 51, wherein the recording plan comprises a data recording plan and further comprising recording a data session conducted by the client, according to the data recording plan.